



Application form for registration of :
Systematic Investment Plan (SIP), Systematic Transfer Plan (STP) and
Systematic Withdrawal Plan (SWP)

Table with 6 columns: Distributor ARN, Sub Distributor ARN, Internal sub Code / Sol ID, Employee Code, EUIN®, Serial No. / Date, Time & Stamp

Upfront commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors' assessment of various factors including the service rendered by the distributor.

\* I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker.

Table for Signatures with columns for First / Sole Applicant / Guardian, Second Applicant, and Third Applicant.

1. Investor and Investment details. Please check wherever applicable.

Sole / First Investor Name (as appearing in ID proof) [Grid]

PAN No. [Grid] Folio No. (For Existing Investor) [Grid]

Scheme Name: \_\_\_\_\_ Plan: [ ] Regular [ ] Direct Option: [ ] Growth [ ] Dividend

Sub-option / Frequency of Dividend: \_\_\_\_\_

Mode of dividend: [ ] Payout [ ] Re-investment [ ] Sweep

Switch: To Scheme \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_

2. Systematic Investment Plan (SIP). Refer point no. I of Terms & Conditions for SIP/STP/SWP

Each SIP Amount (Rs.) \_\_\_\_\_ Frequency: [ ] Monthly / [ ] Quarterly

SIP Frequency Date: [ ] 1st / [ ] 5th / [ ] 10th / [ ] 15th / [ ] 20th / [ ] 25th of the month (1st month of the quarter for quarterly frequency)

From [Grid] To [Grid] or No. of installments \_\_\_\_\_ or [ ] perpetual.

3. Systematic Transfer Plan (STP). Refer point no. II of Terms & Conditions for SIP/STP/SWP

Switch: To Scheme \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_

Dividend Sweep: To Scheme \_\_\_\_\_ Plan \_\_\_\_\_ Option \_\_\_\_\_

Each STP Amount (Rs.) [Grid] Frequency: [ ] Weekly (1st business day of the week) [ ] Monthly [ ] Quarterly

Date: [ ] 1st / [ ] 5th / [ ] 10th / [ ] 15th / [ ] 20th / [ ] 25th of the month / quarter

Enrolment Start [Grid] End [Grid] or No. of installments \_\_\_\_\_

4. Systematic Withdrawal Plan (SWP). Refer point no. III of Terms & Conditions for SIP/STP/SWP

Each SWP Amount (Rs.) [Grid]

Enrolment Start [Grid] End [Grid] or No. of installments \_\_\_\_\_

5. Declaration

I/We hereby, declare that the particulars given above are correct and express my willingness to make payments referred above through participation in National Automated Clearing House (NACH) / Auto Debit.

This is to inform that I/We have registered for Auto Debit Facility and that my payment towards my investment in IDBI Mutual Fund shall be made from my/our bank account registered with IDBI Mutual Fund.

First Unit Holder's Signature \_\_\_\_\_ Second Unit Holder's Signature \_\_\_\_\_ Third Unit Holder's Signature \_\_\_\_\_



UMRN [Grid] Date [Grid]

tick (✓) CREATE [ ] MODIFY [ ] CANCEL [ ] Sponsor Bank Code [Grid] Utility Code [Grid]

I/We hereby authorize [Grid] IDBI Mutual Fund to debit (tick✓) [Grid] SB / CA / €€ / SB-NRE / SB-NRO / Other

Bank A/c Number [Grid]

With Bank [Grid] Name of customers bank [Grid] IFSC [Grid] or MICR [Grid]

an amount of Rupees [Grid] ₹ [Grid]

14 FREQUENCY [ ] Mthly [ ] Qly [ ] H-Yrly [ ] Yrly [ ] As & When presented 15 DEBIT TYPE [ ] Fixed Amount [ ] Maximum Amount

Reference-1 [Grid] FOLIO NO. [Grid] Mobile [Grid]

Reference-2 [Grid] E-Mail ID [Grid]

I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my account as per latest schedule of charges of the bank.

20 PERIOD From [Grid] To [Grid] Or [ ] Until Cancelled 21 Signature of the account holder 22 Name of the account holder

This is to confirm that the declaration has been carefully read, understood & made by me / us. I am authorizing the User entity / Corporate to debit my account, based on the instructions as agreed and signed by me.